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US:IT CIO Open Forum

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US:IT CIO Open Forum

February 28, 2018

2:30 - 4 p.m.

Summary

Task Force Updates

- **Core Services**

David gave a brief update of the task force status and activities to date. Assessments and service owner interviews performed to help classify identified services into the following categories: Core/Essential, System-wide, Niche, Other or Remove. *“Number of Service Offerings CLASSIFIED?” A live poll of Forum attendees correctly identified 221 services as classified out of the 318 service offerings originally offered.* Services were labeled as either internal or external and the team(s) providing the services identified. Additional work will be done to help find missing services. Data will continue to be refined and a cost allocation model will be developed. Niche services will also receive further evaluation.

- **Website Features**

David gave a brief update of the task force status and activities to date. Interviews of IT Ops Managers, the Help Desk Manager and Help Desk Staff/Work Study Students were conducted by task force members to discover common ticket requests and identify useful tools/services/information. Next steps will be to use the results to develop a list of useful tools, services and metrics to include on the website.

- **Remote Desktop Analysis & Recommendations (*Introduction and Status Report*)**

David explained the purpose and charge of this new task force. He updated on the activities of the group to date and shared the possible solutions that are under evaluation. Recommendation expected at next Forum.

- **Mission, Vision & Values**

Karen gave an updated on the groups' activities. SWOT and Gap Analysis information collected and used to identify elements and characteristics that helped shape Mission, Vision and Values. A draft mission statement, vision statement and the recommended core values were shared and next steps announced. *“Which Core Value Do You Feel Strongest About?” A live poll of Forum attendees identified INTEGRITY as the winner with 41% of the vote.*

Website (www.maine.edu) Accessibility

David provided an update regarding a notice of complaint received from the Department of Education Office of Civil Rights alleging non-accessibility for some pages on maine.edu. He explained what a

possible investigation would look like and shared some options for resolution. This initial complaint was directly solely at maine.edu, however other complaints would not be unexpected for other UMS campus websites in the future. Expectations and deliverables of the voluntary resolution agreement entered into were shared with the group and next steps reviewed.

- MaineStreet is not included in the complaint.
- None of the issues in the complaint are insurmountable. The biggest challenge will be the pdf docs that are uploaded to the site. Scanned images are not easily made accessible.

Strategic Planning Sessions

David introduced the process and shared desired outcomes. Mini planning retreats are being planned and a tentative schedule was shared. **All US:IT staff are encouraged to attend one of the planning sessions and may attend any session that is convenient. Register by visiting**

<https://goo.gl/forms/QNGpFzRXNazZOtpu1>. *“Which aspect of Strategic Planning are you most looking forward to?”* A live poll of Forum attendees identified **CRAFTING THE VISION AND FUTURE FOR US:IT** as the winner with 53% of the vote. Strategic Planning will also be a part of this year’s US:IT Summit.

Upcoming Events

- **Lunch n Learn Sessions**

Sessions are announced to all staff via email. Schedule and registration are available at <https://goo.gl/PLMp1n>.

- **Oracle Day**

PeopleSoft Module Demos are scheduled for March 15 at UMaine for Campus Solutions and Budget (Cloud only option). Schedule will be shared before the date.

- **Business Intelligence Platform (BI) Demos**

Working to schedule Microsoft PowerBI and Oracle Business Intelligence Cloud demos. Dates will be announced. These are reporting tools that would provide additional functionality to current tools.

US:IT Summit

Planning has begun and a date will be announced shortly, likely in late May. Volunteers are encouraged to reach out to Carol Sobzcak and/or Cathy Caron.

TASK FORCE UPDATES

► Core US:IT Services

- Catalog and review all supported services
- Categorize by use and adoption for each campus

► Responsibilities

- Produce listing of US:IT Services by category to initiate budget planning activities – Late Jan '18**

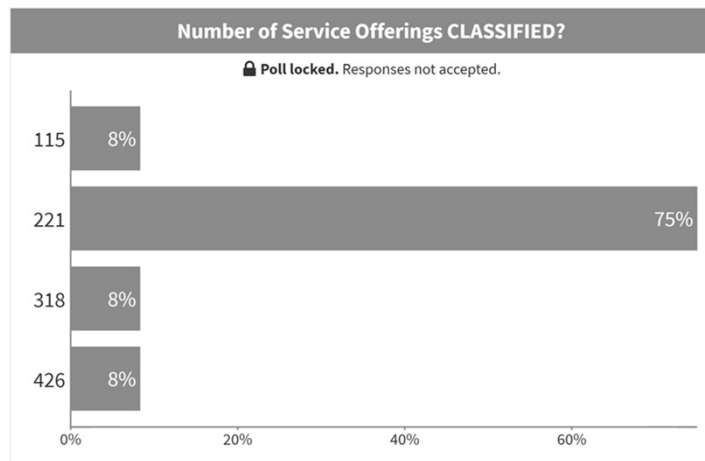
Team members:

Gary Lagasse – Task Force Lead
 Andrew Moody
 Daniel LaLonde
 Jeffrey Jensen
 Jennifer Smith
 John Brown
 Kim Tran
 Loni Levesque
 Michael Cyr
 Steven Premeau
 Jim Kessler

TASK FORCE UPDATES

► Core US:IT Services

- Originally identified 318 Service Offerings
- After evaluation, interviews, how many Service Offerings did the Core US:IT Services Task Force CLASSIFY?



TASK FORCE UPDATES

► Core US:IT Services

► Assessment Report

► Task Force interviewed service owners; classified services into following categories:

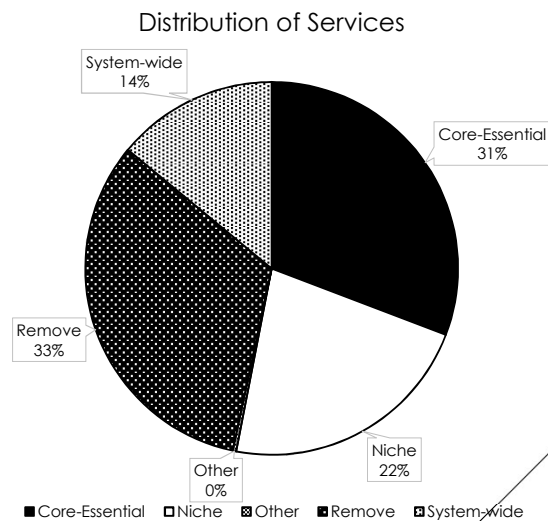
- Core/Essential
- System-wide
- Niche
- Other
- Remove*

► Additional investigation required to identify 'missing' services

TASK FORCE UPDATES

► Core US:IT Services

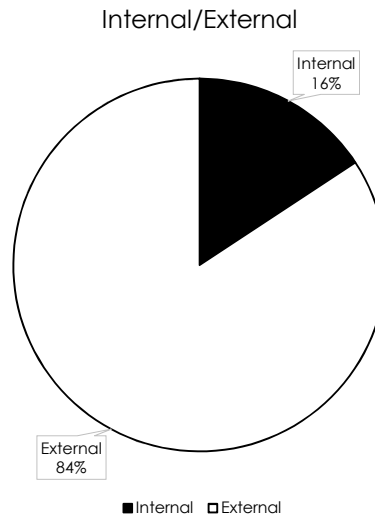
► Assessment Report



TASK FORCE UPDATES

► Core US:IT Services

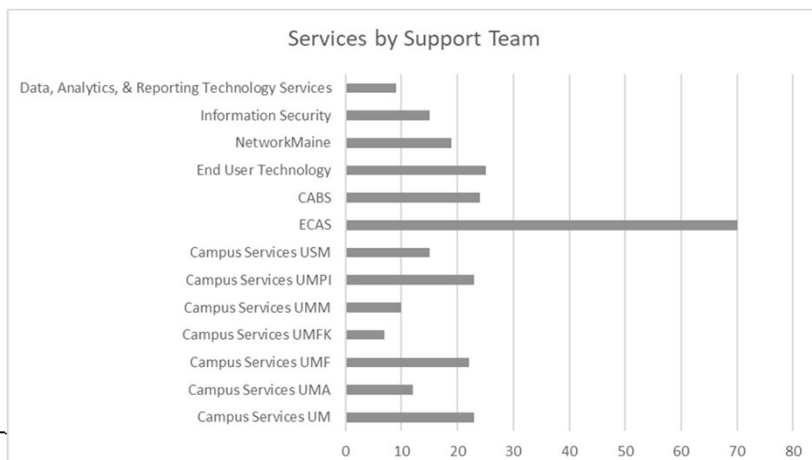
► Assessment Report



TASK FORCE UPDATES

► Core US:IT Services

► Assessment Report



TASK FORCE UPDATES

► Core US:IT Services

► Next Steps

- Task Force has expressed desire to continue to refine the collected data
- Cost Allocation Model to be developed estimate/quantify TCS for Core-Essential and System-Wide Services
- Niche Services will be evaluated for TCS separately
- Goal: Provide transparency to campuses for cost of services

TASK FORCE UPDATES

► US:IT Website Review

- Provide recommendations and suggestions on essential services, features and information to be included in US:IT Website

► Responsibilities

- Canvas System IT websites nationwide; identify common functions and features
- Provide final recommendations supported with examples by Mid March '18**

Team members:

Sara Farnham – Task Force Lead
 Amanda Gagnon
 Cathy Caron
 Corina Larsen
 John Warena
 Jonathan Stence
 Vallie Vel
 Lloyd Smith
 Matthew Shultz
 Michelle Miller
 Tom O'Donnell

TASK FORCE UPDATES

► US:IT Website Review

► Update

► Interviews

► Discover common ticket requests and useful tools/services/information

► Audience:

► IT Ops Managers/Help Desk Manager/Help Desk Staff and Work Study Students

► Questions:

► What are the top (3) most common ticket requests (not outage related)?

► Which issues could be resolved easily if users had direct access to tools or information on our site?

► What web resources do you use to access tools and information?

► What tools are lacking in those locations?

TASK FORCE UPDATES

► US:IT Website Review

► Update

► Next Steps

► Use interview results to inform recommendations for tools/services/resources to include

► Developing list of useful online tools & services for users

► Reviewed external metrics available on University websites

► Developing list of useful metrics to include

► Recommendations document creation > Submission to CIO

TASK FORCE UPDATES

► Remote Desktop Access/Services

► Purpose

- Recent Observation: enabling RDP (remote desktop protocol) on workstations has exposed a brute force attack vulnerability
- Incidents of user account lockout have resulted

► Task Force Charge:

- Investigate issue
- Provide recommendations on mitigation strategies that align with current network configuration (Early-Mid March)
- Propose viable solution implementable within 90-180 days

TASK FORCE UPDATES

► Remote Desktop Access/Services

► Activities

- Identify Use Cases across UMS
- SWOT Analyses
 - Current Use Cases
 - Potential Solutions
- Identify and Assess Possible Solutions
 - Costs
 - Implementation time/effort
 - Responsible Offices
 - Pros/Cons

Team members:

- John Forker (Lead)
- Garry Peirce
- Marc Goff
- Jim Cyr
- Tom Drake
- Andy Moody
- Josh Hunsinger

TASK FORCE UPDATES

► Remote Desktop Access/Services

► Possible Solutions Under Evaluation

- RDP Gateway
- Advanced Password Policies
- Enhanced Local Client Mgmt & Logging
- Local IPSEC (connection key) Implementation
- Enhanced VPN
- Commercial Remote Access
- Apache Guacamole (clientless gateway)

Team members:

- John Forker (Lead)
- Garry Peirce
- Marc Goff
- Jim Cyr
- Tom Drake
- Andy Moody
- Josh Hunsinger

TASK FORCE UPDATES

► Mission, Vision, Values

- To define the shared mission and vision for US:IT and the core values to which we aspire

► Responsibilities

- Conduct internal/external environmental scan across member campuses
- Solicit input from all teams/members in US:IT
- ***

Team members:

Karen Walsh – Task Force Lead
 Angela Cook
 Fred Brittain
 John St. Peter
 Marcie Greene
 Steven Premeau
 Tanner Kelleter
 Phil Hilton
 Tamara Saarinen

https://docs.google.com/presentation/d/1WVIRkv1YR3jnR3j2JTXVqy4YNlc1Am48ITavD1Sxw/edit#slide=id.g321d2a2a03_0_49

DISCOVERY PHASE - SWOT AND GAP ANALYSIS

- Internal Survey Summary (US:IT)
 - Internal Common Themes
- External Survey Summary
 - External Common Themes
- Interview Summaries
 - UMA
 - UMaine
 - UMF
 - UMFK
 - UMM
 - UMPI
 - USM



HOW OUR TEAM USED THE DISCOVERY WORK

- Focused on elements that were most prevalent - the People of US:IT
- Identified characteristics that helped shape Mission and Vision Statements



THE PURPOSE OF A MISSION STATEMENT

- Explains the purpose of our organization - what we do and why we do it.
- Answers the questions Who, What, Why and How
- Practical, Rooted, In the Present
- Inclusive of the goals and people within US:IT



OUR DRAFT MISSION STATEMENT

US:IT designs and supports technology solutions through a team of knowledgeable, dedicated professionals. Working within a structure of shared governance and data-driven decisions, we support the mission of the University of Maine System and its campuses.

THE PURPOSE OF A VISION STATEMENT

- Outlines our business goals and where we're heading
- Aspirational, Inspirational, Motivational
- Will it draw people to common work?
- Does it give hope for a better future?

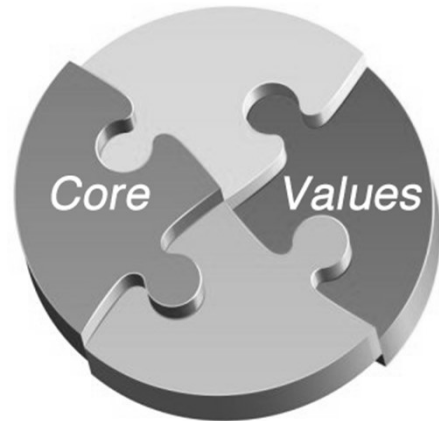


OUR DRAFT VISION STATEMENT

US:IT strives to be a trusted partner by empowering our university communities with reliable and innovative solutions.

CORE VALUES

- Support the vision, shape the culture and reflect what an organization values.
- Help organizations in decision-making
- Educate clients and potential customers on what the organization is about
- Are becoming primary recruiting and retention tools



RECOMMENDED CORE VALUES

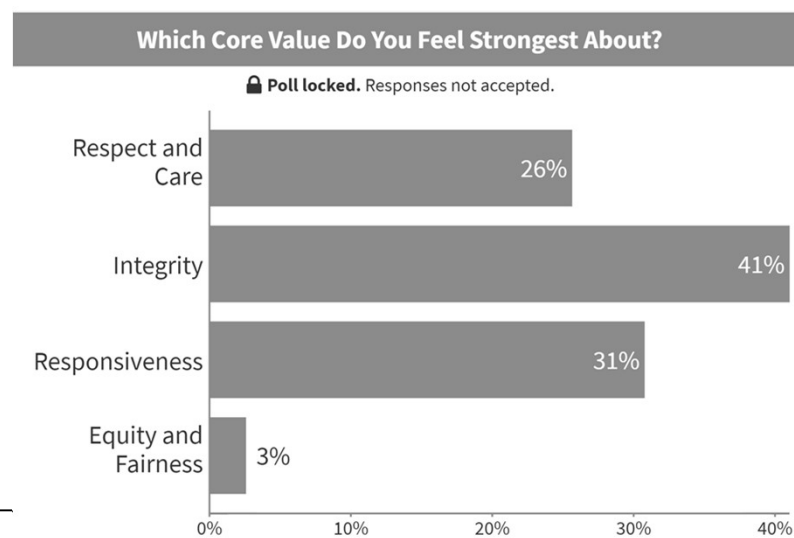
- Respect and Care
- Integrity
- Responsiveness
- Equity and Fairness

NEXT STEPS

- Collective Summary of Interviews
- Develop a Communication Plan
- Feedback on Draft Mission and Vision Statement
- Feedback on Core Values
- Email mvv-group@maine.edu
- Work with CX Council to finalize Behavior Sentences

TASK FORCE UPDATES

► Mission, Vision, Values



WEBSITE ACCESSIBILITY

- ▶ Department of Education Office of Civil Rights issued notice of complaint on Nov. 20, 2017 alleging non-accessibility for persons with disabilities for the following pages:
 - ▶ <http://www.maine.edu>
 - ▶ <http://www.maine.edu/campus-life>
 - ▶ <http://www.maine.edu/admissions-aid/financial-aid>
- ▶ As recipients of Federal financial assistance under Section 504 of the Rehabilitation Act (1973) and Americans with Disabilities Act (1990), OCR indicated jurisdictional authority to investigate claim

WEBSITE ACCESSIBILITY

- ▶ OCR Investigation would include:
 - ▶ Determine if UMS has excluded persons with disabilities from participating in or receiving benefits of services through its website “www.maine.edu”
 - ▶ Determine if UMS has failed to ensure communications with applicants, participants or other members of the public with disabilities are as effective as its communications with others

WEBSITE ACCESSIBILITY

► UMS Options

- Dispute claim
- Enter voluntary resolution agreement**

► Voluntary Resolution Agreement

- Executed by Office of General Counsel and the Office of Civil Rights on Feb 23, 2018
- Involved several rounds of negotiation to restrict the scope of the agreement
 - www.maine.edu, including web pages, content and documents
 - Excludes other campus sites and sub-domains

WEBSITE ACCESSIBILITY

► Voluntary Resolution Agreement

► Expectations:

- UMS reaffirms commitment to ensure people with disabilities have opportunity equal to that of nondisabled peers to participate in UMS programs, benefits and services
- UMS uses W3C's Web Content Accessibility Guidelines (WCAG) 2.0 Level AA standards as a benchmark for functionality
- UMS uses Web Accessibility Initiative Accessible Rich Internet Applications Suite (WAI-ARIA) 1.1 standards as a benchmark for web content

WEBSITE ACCESSIBILITY

► Voluntary Resolution Agreement

► Deliverables:

► Audit of Existing content and functionality

- External audit of ALL pages and content considered in scope for accessibility
- Development of Corrective Action Plan
- Proposed auditor to be submitted to OCR for approval by June 15, 2018

► Establish Task Force to develop Strategic Action Plan

- Review and revise policies and procedures governing new website content
- Devise plan to address issues identified via audit
- Develop/deliver website accessibility training
- Action Plan must address corrective actions within 12 months of approval by OCR

WEBSITE ACCESSIBILITY

► Voluntary Resolution Agreement

► Deliverables:

► Propose Policies and Procedures for New Web Content and Functionality

- Policy must ensure that all new, newly-added or modified content is accessible as measured by indicated benchmarks
- New policies to be submitted 60 days from OCR approval of Action Plan
- UMS adoption of policies within 30 days of OCR approval

► Undue Burden

- For technology-related requirements, UMS may assert undue burden or fundamental alteration defense
- Must be submitted by Chancellor or designee
- Must submit written statement asserting defense to OCR; include statement on how UMS will provide *'equally effective alternate access'*

WEBSITE ACCESSIBILITY

► Voluntary Resolution Agreement

► Deliverables:

► Training

- Website accessibility training will be made available to all appropriate personnel
- Training to be available within 120 days of agreement; offered annually thereafter

► Next Steps:

- Have assigned Mike Cyr to investigate options for securing Audit Services
- Will coordinate with VCAA to charge Task Force
- Identification of Business Owner for www.maine.edu

STRATEGIC PLANNING

► Outcome:

- Creation of 3-5 year roadmap
- Clarify priorities
- Support for budget and resource planning
- Discrete annual deliverables



STRATEGIC PLANNING

► Process

- 1) Clarify Mission, Vision, Values
- 2) Analyze Current Position
- 3) Identify Opportunities aligned with M/V/V
- 4) Prioritize Objectives aligned with M/V/V
- 5) Assemble Plan
- 6) Determine Goals and KPIs
- 7) Determine Resource & Budget Needs
- 8) Assign Tasks & Responsibilities
- 9) Measure progress/performance



STRATEGIC PLANNING

► Strategic Planning Mini-Retreats (March – April)

► Goal:

- Produce prioritized list of Goal Statements aligned with US:IT Mission, Vision & Values

► Audience:

- Open to all US:IT Staff

► Duration:

- 3 Hours

STRATEGIC PLANNING

► Strategic Planning Mini-Retreats (March – April)

► Schedule:

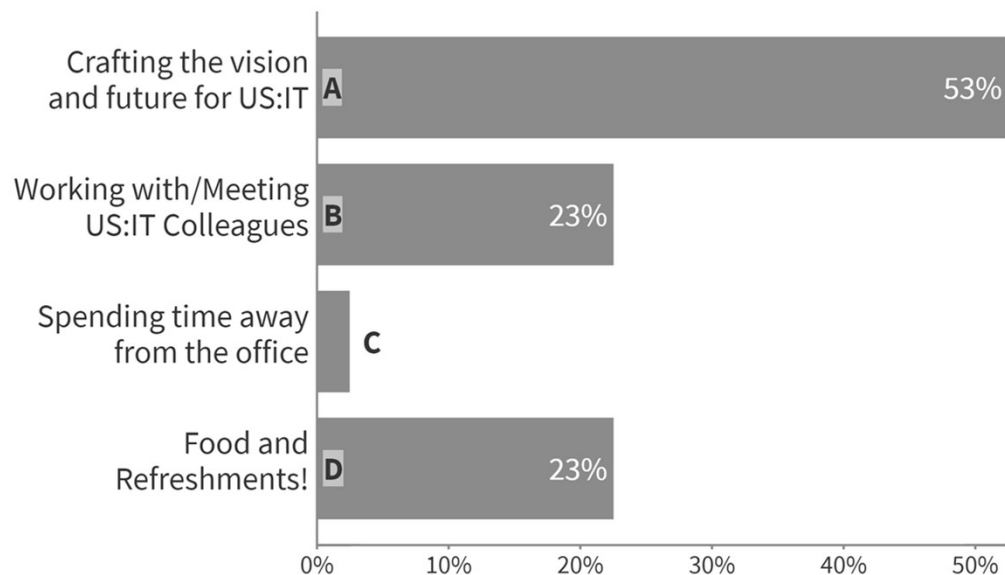
<u>Date</u>	<u>Time</u>	<u>Location</u>
► Friday March 9	9:00a-Noon	UMA/Jewett Hall Room 190
► Wednesday March 14	1:00p-4:00p	USM/Payson Smith Room 1
► Friday March 30	TBD	UM/TBD
► Monday April 2	TBD	UM/TBD
► Friday April 6	9:00a-Noon	USM/Luther Bonney Room 326
► Tuesday April 17	TBD	UMPI/TBD

► Note: Staff may attend **any** session that is convenient

► Registration: <https://goo.gl/forms/QNGpFzRXNazZOtpu1>

Which aspect of Strategic Planning are you most looking forward to?

i Poll is full and no longer accepting responses



UPCOMING EVENTS

► Lunch 'n Learn Sessions

- Session Schedule & Registration: <https://goo.gl/PLMp1n>
- Includes Session Archives
- Next Session: Google Suite Tips and Tricks – March 7

► Oracle Day

- PeopleSoft Module Demos
 - Campus Solutions
 - Budget
- March 15 – UMaine

UPCOMING EVENTS

► Business Intelligence (BI) Demos

- Working to schedule following Demos
 - Microsoft PowerBI
 - Oracle Business Intelligence Cloud
- Dates/Locations will be announced shortly

► US:IT Summit

- Date to be announced shortly (Late May/Early June)
- Portion of day to be spent pulling Strategic Planning information together
- Awards, Prizes, Food and Fun will be on the agenda!
- Individuals interested in helping with the event, please contact Carol Sobczak or Cathy Caron